

# Fetching the facts: Mapping the Australian assistance dog sector.

Report prepared for Assistance Dogs International, November 2026.

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# EXECUTIVE SUMMARY

## Assistance dog handlers experience discrimination and are routinely refused access to public spaces, business premises and transport.

Assistance dogs provide an essential function for people with disability. They help people with disability live safely, independently and confidently.

The Disability Discrimination Act 1992 protects the rights of assistance dog handlers. It makes it unlawful to discriminate against a person with a disability.

Despite these protections, assistance dog handlers continue to experience discrimination.

- 58 percent of handlers in Australia experienced an access refusal over a one-year period.
- 59 percent of handlers in Australia considered avoiding public places altogether.

This discrimination has a significant emotional and behavioural impact on people with disability.

## Fragmentation in assistance dog definitions and provider standards undermines the community trust needed to drive down access refusals

Eliminating access refusals requires a strong foundation of a coherent regulatory framework for the assistance dogs sector. This foundation underpins other pillars needed to support positive outcomes for handlers:

- Community trust in the integrity of the sector,
- Education on the role of assistance dogs and associated legal rights and responsibilities, and
- Enforcement of these legal obligations.

However, fragmented definitions and provider standards erode these pillars. In a global survey

- 65 percent of assistance dog handlers encountered scepticism regarding their dog's legitimacy as an assistance dog.
- 81 percent feel this is because of an increase in untrained assistance dogs.

There is a patchwork of overlapping legislation which attempts to define assistance dogs and animals. These definitions are often vague or inconsistent across jurisdictions.

Fragmented and vague definitions have facilitated large variations in training standards. We estimate that up to 25 percent of assistance dogs are placed by Assistance Dogs International (ADI) or International Guide Dog Federation (IGDF) accredited providers. These dogs are trained to standards which reflect established global best practice. The remaining 75 percent of assistance dogs are trained to varying and often unknown standards.

### ADI recommends five measures to elevate the integrity of the assistance dog system and improve outcomes for people with disability

To improve standards in the assistance dog provider system, ADI recommends:

- Clear legal definitions: Australia should adopt a clear legal definition for assistance animals that aligns with international standards.
- Clear national standards: Australia should apply a clear set of national standards for all assistance dogs, including a consistent national public access test.
- A national accreditation and compliance framework: Australia should adopt an accreditation scheme for training organisations and a single national identity card for handlers of accredited assistance dogs.
- Public education: Once the new national standards and accreditation scheme are in place, public education is needed to ensure businesses and the public can recognise an accredited assistance dog.
- A formalised complaints process: A national process should be established for the consistent lodging, review, monitoring and resolution of complaints related to access and discrimination under the Disability Discrimination Act.

This framework does not diminish the therapeutic value of domestic pets. However, a cohesive national framework for assistance dogs is needed to uphold integrity in the critical role that they serve for people with disability.

## ASSISTANCE DOG PROVIDER ANALYSIS

### Assistance dog handlers experience discrimination and are routinely refused access

Assistance dogs help people with disability live safely, independently and confidently. (Assistance Dogs Australia, *Impact Report 2025 – 2026*).

- 99 percent of handlers said assistance dogs improved their independence.
- 97 percent said that an assistance dog had a significant positive impact on daily activities.

The *Disability Discrimination Act 1992* protects the rights of assistance dog handlers. It makes it unlawful to discriminate against a person with a disability.

Despite these protections, assistance dog handlers continue to face discrimination and are refused access to public spaces and business premises, including restaurants and cafes, medical facilities, hotels and grocery stores.

The International Guide Dog Federation *Paws for Access 2025* report found:

- 58 percent of assistance dog handlers in Australia have experienced an access refusal over a one year period.
- 59 percent of handlers in Australia considered avoiding public places altogether.

These refusals have a significant emotional and behavioural impact on people with disability.

## Education, enforcement and community trust can help eliminate access refusals

Eliminating access refusals requires a strong foundation of a coherent framework for the assistance dog sector. This framework includes consistent definitions and provider standards across all states and territories.

A coherent framework underpins three pillars needed to uphold positive outcomes for handlers:

- *Community trust*: Business and community trust in the integrity of the assistance dog system can help address doubt around the legitimacy of assistance dogs. Greater trust reduces the reliance on extensive enforcement as a tool to uphold the rights of handlers.
- *Education*: Public understanding of the role of assistance dogs, and business awareness of their legal responsibilities relating to assistance dogs can help reduce access refusals. Education should emphasise that assistance dogs come in all breeds and assist people with a range of disabilities.
- *Enforcement*: Stronger enforcement of the *Disability Discrimination Act 1992* will uphold the rights of assistance dog handlers to access public spaces.

Table 1: Foundations and pillars to eliminate access refusals of assistance dog handlers

| Layer | Element |
|---|---|
| **Outcomes** | Positive outcomes for people with disability, including the elimination of access refusals |
| **Three pillars** | Community trust: Trust in the integrity of the assistance dog system |
| | Education: Public understanding of assistance dogs, and business awareness of their legal responsibilities |
| | Enforcement: Legal enforcement of rights and responsibilities under legislation |
| **Foundation** | A coherent regulatory framework for the assistance dogs sector |

Source: Mandala analysis.

## Fragmented definitions and provider standards undermine this framework

There is a patchwork of overlapping and inconsistent Commonwealth and state/territory definitions and provider standards for assistance dogs in Australia.

Commonwealth legislation creates three definitions for an assistance animal, including one definition that relies on state or territory legislation. It also leaves provider standards up to states and territories.

States apply inconsistent definitions and standards. Some states define assistance animals or dogs, while Tasmania only defines a guide dog. States also apply different standards for providers. This means an assistance dog accredited in one state may not be recognised in another. This creates challenges for people with disability when travelling, alongside businesses in the hospitality and travel sectors.

With no national accreditation standard, the National Disability Insurance Agency currently relies on its own definition which is recommended by La Trobe University.

This legislative incoherence undermines all three pillars. It makes it harder for businesses to understand their legal obligations relating to assistance animals. It makes it harder to enforce these obligations to uphold the rights of handlers. And it makes it harder to build public trust in the assistance dog system. A coherent national framework will require coordination across all states and territories to ensure legislation is consistent.

Table 2: *Legislated definitions and provider standards for assistance dogs for selected jurisdictions*

| Jurisdiction | Relevant definitions | Provider standards |
|---|---|---|
| Commonwealth<br>(*Disability Discrimination Act 1992*) | An assistance animal is:<br>Accredited under the law of a State or Territory; or<br>Accredited by a prescribed animal training organisation; or<br>Trained to alleviate the effect of disability and meet standards of hygiene and behaviour appropriate for an animal in a public place | None specified |
| Queensland<br>(*Guide, Hearing and Assistance Dogs Act 2009*) | An assistance dog is a dog trained to perform identifiable physical tasks and behaviours to assist a person with a disability to reduce their need for support | Only approved trainers meeting specified criteria may certify an assistance dog through a public access test |
| New South Wales<br>(*Companion Animals Act 1998*) | An assistance animal defined with reference to the *Disability Discrimination Act 1992*. | None specified |

| Jurisdiction | Relevant definitions | Provider standards |
|---|---|---|
| Victoria<br>(*Equal Opportunity Act 2010*) | An assistance dog is a dog trained to perform tasks or functions that assist a person with a disability alleviate the effects of their disability | None specified |
| South Australia<br>(*Dog and Cat Management Act 1995*) | An assistance dog is a dog trained and used for the purpose of assisting a person who is wholly or partially disabled | Only a prescribed accreditation body may accredit a dog as an assistance dog |
| Tasmania<br>(*Guide Dogs and Hearing Dogs Act 1967*) | A guide dog is a dog that has been, or is being, trained by an approved institution to assist a person with a vision or hearing impairment | An approved guide or hearing dogs institution must be declared as such by the Minister |

Source: Senate Estimates: National Principles for the Regulation of Assistance Animals; Mandala analysis.

## Fragmented legislation leads to fragmented standards: only 25% of dogs are placed by ADI/IGDF accredited providers

We estimate there were at least 1,000 assistance dogs placed in 2025 from four types of providers. We include all dogs that are described as ‘assistance dogs’ by their providers. However, these dogs may differ significantly in their training and the assistance they provide. This variance is facilitated by the incoherent regulatory landscape governing the assistance dogs sector.

Only about 250 (~25%) of these assistance dogs were placed by ADI/IGDF accredited providers. For these providers:

- All trainers must meet international standards to train dogs.
- All dogs placed are trained to international standards, which ensure they are safe to operate in public and support their clients in alleviating their disability.
- Annual public access tests are conducted to ensure dogs and clients continue to meet these standards.

There were about 750 (~75%) assistance dogs trained by other organisations and private trainers. Owner-trained dogs were not quantified as part of our analysis. It is not possible to characterise the standards these dogs are trained to, and how far from international best practice they are. There is likely wide variability with no comprehensive state-based accreditation framework in place to manage training standards outside Queensland.

Note: Queensland is the only state with a dedicated framework covering government approval of trainers and training institutions, public access testing, dog certification, handler identity cards, compliance and suspension/cancellation powers.

Table 3: *Estimated number of assistance dogs by provider type*

| Provider type | Description | Estimated number of assistance dogs placed (#, % of total, 2025) |
|---|---|---|
| **Businesses: Organisations accredited by ADI/IGDF** | Assistance dog training businesses that are accredited by Assistance Dogs International (ADI) and/or International Guide Dog Federation (IGDF) | ~250 (~25%) |
| **Businesses: Other organisations** | Non-sole trader assistance dog training businesses that are not accredited by ADI and/or IGDF | ~550 (~55%) |
| **Businesses: Private trainers** | Assistance dog training businesses registered as sole traders (none are accredited by ADI or IGDF) | ~200 (~20%) |
| **Non-businesses: Other owner-trainers** | Owners who have trained their dogs to provide assistance (not through a business) | Not quantified |
| **TOTAL** | | ~1,000 |

Note: Figures may not sum due to rounding. Source: ABR (2026) *ABN Bulk Extract*; ABS (2021) *2021 Census*; Mandala analysis.

## Only 10% of dogs for people with disabilities other than vision or hearing impairment are ADI/IGDF accredited

Rates of ADI/IGDF accreditation are highest for assistance dogs for people with vision or hearing impairments. These two types of assistance dogs account for only 25 percent of all dogs placed in 2025.

Dogs to assist people with disabilities other than vision or hearing impairment, for example PTSD, autism, seizures account for about 75 percent of all dogs placed in 2025. This segment is also the most fragmented, with only 10 percent of these dogs trained by ADI/IGDF accredited organisations. Most of these assistance dogs are trained by other organisations, private trainers, or owners.

It is important that these dogs are trained to the highest standards to ensure they can best assist people with disability while upholding the integrity of the assistance dog sector.

Table 4: *Estimated number of assistance dogs by provider type, 2025, Australia*

| Type of dog | Total | Share of dogs trained by organisations accredited by ADI/IGDF |
|---|---|---|
| Dogs for people with disabilities other than vision or hearing impairment, for example PTSD, autism, seizures. | ~750 (~75%) | ~10% |
| Dogs for people with vision impairments | ~150 (~20%) | ~80% |
| Dogs for people with hearing impairments | ~50 (~5%) | ~60% |

Notes: Includes dogs trained by businesses only. Excludes exclusively owner-trained dogs. Figures may not sum due to rounding. Source: ABR (2026) *ABN Bulk Extract*; ABS (2021) *2021 Census*; Mandala analysis.

## ADI recommends five urgent measures to build a consistent, trusted assistance dog framework

Table 5: *ADI recommendations for a cohesive assistance dog framework*

| # | Measure | Description |
|---|---|---|
| **1** | Clear definitions | Australia should adopt a clear legal definition for assistance animals that aligns with international standards, such as those developed by ADI and the European Committee for Standardisation. |
| **2** | Clear national standards | Australia should apply a clear set of national standards for all assistance dogs, including a consistent national public access test. ADI and IGDF standards could provide a sensible basis for national standards in Australia that align with decades of international progress and best practice. No government funding has yet been set aside for the development of a public access test. |
| **3** | A national accreditation and compliance framework | Australia should adopt an accreditation scheme for training organisations and a single national identity card for handlers of accredited assistance dogs. This accreditation scheme should be supported by robust compliance and enforcement mechanisms. No government funding has yet been set aside for the development of a national identity card. |

| # | Measure | Description |
|---|---|---|
| **4** | Public education | Once the new national standards and accreditation scheme are in place, public education is needed to ensure businesses and the public can recognise an accredited assistance dog. |
| **5** | A formalised complaints process | A national process should be established for the consistent lodging, review, monitoring and resolution of complaints related to access and discrimination under the *Disability Discrimination Act 1992*. |

Note: The Department of Social Services (DSS) is currently leading work to develop nationally consistent accreditation requirements for assistance animal trainers and training organisations. DSS currently expects a three-year timeline from endorsement of the principles to full operation. Source: Submission on behalf of Assistance Dogs International for the Review of the *Disability Discrimination Act 1992*; Submission on behalf of the ADI Oceania Council for the Draft National Principles for the Regulation of Assistance Animals; Senate Estimates: National Principles for the Regulation of Assistance Animals.

This recommended framework does not diminish the therapeutic value of all types of domestic pets. However, a cohesive national framework for assistance dogs is needed to uphold integrity in the critical role that they serve for people with disability.

# METHODOLOGICAL APPENDIX

## The analysis uses novel statistical techniques to estimate the size and composition of the sector

Table 6: *Overview of two methods used to estimate the number of assistance dogs by provider type*

| Method | Process | Key data source |
|---|---|---|
| Analysis of ABN data to estimate number and type of providers | Shortlist ABNs using dog-related keywords, for example “paws”, “tails”, “dogs” from ~8 million ABNs to ~12,000<br>Analysed ~12,000 shortlisted businesses to identify assistance dog providers and their characteristics by searching publicly available sources using n-shot coding techniques.<br>Validated data with provider lists from state governments, ADI and Flinders University.<br>Estimated total number of dogs placed using placement data published by some organisations and private trainers. | ABN Bulk Extract (August 2026) |
| Analysis of census data to estimate number of private trainers | Extracted data on ANZSCO code 361111; Dog trainer and handler.<br>Estimated number of private trainers using sole trader data.<br>Estimated the proportion of dog trainers that offer assistance dog training services, using a sample from Pet Professional Guild Australia.<br>Estimated total number of dogs placed using placement data published by some organisations and private trainers. | Australian Census (2021 data) |

Notes: Keywords were identified using existing assistance dog provider lists: QLD and ACT government lists, Flinders University list and ADI providers. N-shot coding was used to improve the accuracy of the classification task. Source: ABR (2026) *ABN Bulk Extract*; ABS (2021) *2021 Census*; Mandala analysis.

## ABN data analysis

Table 7: *Methodology for ABN data analysis*

| Step | Description |
|---|---|
| Data download and keyword search | Downloaded the ABN bulk extract data covering active and inactive ABNs in Australia.<br>The database included each business' ABN, state/territory of registration and details on the type of business, for example sole trader, public company, and so on.<br>Filtered data down to ~8M active ABNs.<br>Applied the following dog-related and assistance-related keywords to identify potential assistance dog businesses: Dog, Dogs, Tail, Tails, Paw, Paws, Canine, Canines, K9, Pup, Pups, Hound, Hounds, Leash.<br>Broad words like Guide, Companion, Handler, Coaching, Training, Assistance needed to appear with animal related words like Animal, Animals, Pet, Pets, Veterinary, Disability, Harness.<br>Filtered the database down to ~12,000 potential assistance dog businesses. |
| N-shot coding and analysis | Used n-shot coding to classify potential assistance dog businesses. This approach uses a small set of coded examples to guide the model's classification.<br>Manually coded ten example businesses: five assistance dog training businesses and five non-assistance dog training businesses.<br>Focused examples on edge cases. For example, general dog training businesses and businesses that bred dogs for assistance dog training were classified as non-assistance dog training businesses.<br>Classified each business by assistance dog training status. For assistance dog trainers, the model also identified type of dog trained, delivery model and profit-making status.<br>Identified 260 businesses as assistance dog training businesses. |

| Step | Description |
|---|---|
| Validate data | Validated the results against the following assistance dog provider and trainer lists, and added in missing entries:<br>• Assistance Dogs International accredited provider list (Australia).<br>• International Guide Dog Federation accredited provider list (Australia).<br>• Australian Capital Territory government registered trainer list.<br>• Queensland government approved trainers and training institution list.<br>• Flinders University list.<br>• Adjusted our estimates to capture the ~20% of assistance dog providers not captured in our keyword search. |

Note: Analysis of a sample of assistance dog business names found that ~80% of businesses had dog-related words in the name. Source: Stanford University Human-Centred Artificial Intelligence (n.d.) *What is Few-Shot Learning?*; Mandala analysis.

### Census data analysis.

**Number of dog trainers that are sole traders**. [Dog trainers and handlers that are sole trader] x 1 – [Percentage of sole traders that could be handlers].

- Dog trainers and handlers that are sole traders = 642 (ABS (2021) *2021 Census).*
- Percentage of sole traders that could be handlers (that are not dog trainers) = 2% (National Skills Commission (2021) *Australian Jobs 2021)*

**Proportion of dog trainers that are assistance dog trainers.** [All service dog trainers registered with PPGA] / [All dog trainers registered with PPGA].

- All service dog trainers registered with PPGA = 62 (PPGA (n.d.) *Member Directory)*
- All canine professionals registered with PPGA = 175 (PPGA (n.d.) *Member Directory)*

**Number of assistance dog trainers that are sole traders.** [Number of dog trainers that are sole traders] x [Proportion of dog trainers that are assistance dog trainers]

- Number of dog trainers that are sole traders = 627 (Mandala analysis).
- Proportion of dog trainers that are assistance dog trainers = 35% (Mandala analysis).

## Number of assistance dogs placed by unaccredited organisations and private trainers

Table 8: *Parameters for number of dogs placed by unaccredited organisations*

| Type of unaccredited trainers | No. of dogs placed p.a. per organisation/ private trainer | Rationale | Source |
|---|---|---|---|
| Unaccredited state recognised organisations | 9 | Average of dogs placed by four state-recognised organisations | Guide Dogs (n.d.) *Internal data* |
| Unaccredited organisations not registered in any state (only trains assistance dogs) | 4 | Lowest number of dogs placed by any state-recognised organisation, applied as a conservative floor | Guide Dogs (n.d.) *Internal data* |
| Unaccredited organisations not recognised in any state (also does general training) | 2.5 | Splits capacity across services, so operates at the scale of a dedicated private trainer | Mandala analysis |
| Very small unaccredited organisations | 0.8 | Registered as small entities, so operates at the scale of a diversified private trainer | Mandala analysis |

Table 9: *Parameters for number of dogs placed by unaccredited private trainers*

| Type of unaccredited trainers | No. of dogs placed p.a. per organisation or private trainer | Rationale | Source |
|---|---|---|---|
| Private trainers that only do assistance dog training | 2.5 | Trains around 5 dogs per year, with placement taking 1.5 to 2 years. | Example - Kristen's Pup 2 Dog Training (n.d.) |
| Private trainers that do both general dog training and assistance dog training | 0.8 | Offers around three services, so places a third of a dedicated trainer's dogs | Mandala analysis |

Note: Very small unaccredited organisations refer to businesses registered as Discretionary Trading Trust, Family Partnership, Other Partnership and Other Unincorporated Entity.

